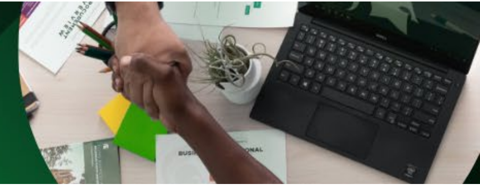


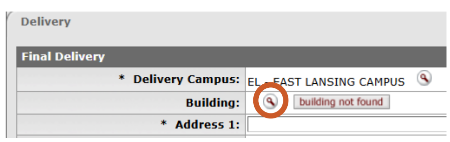
Create a Requisition

Overview: This job aid demonstrates how to purchase goods and/or services via a requisition in KFS.

1. Login to EBS.
2. Click the **Financial System** tile.
3. On the Main Menu, under Transactions, click the **Requisition** link.

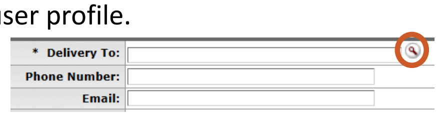
4. In the Document Overview tab, add a brief identifier for the purchase within the **Description** field.

5. In the Delivery tab, complete the **Final Delivery address** fields:
   a. On the Building line, click the **search** icon to search for and select a building.



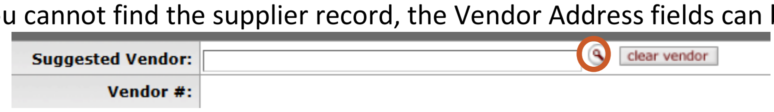
   b. Add the appropriate **Room** number.

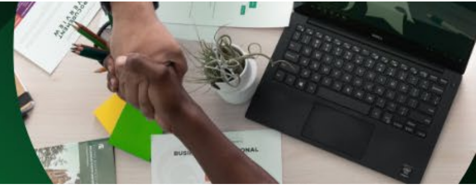
   c. Verify the **Delivery To**, **Phone Number**, and **Email** fields are complete and accurate.
      i. **Note:** If the recipient is another employee, select the search icon on the Delivery To line to search for and select their user profile.



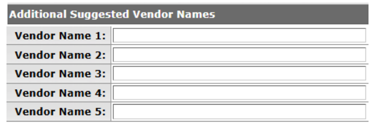
6. If desired, add suggested supplier for the purchase.
   a. Click the **show** button on the **Vendor** tab.

   b. Click the **search** icon next to the Suggested Vendor field to search for and select the supplier's KFS record.
      i. **Note:** if you cannot find the supplier record, the Vendor Address fields can be manually completed.

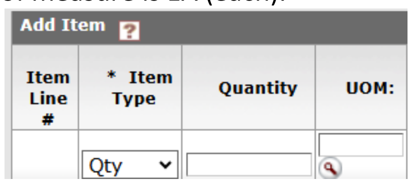




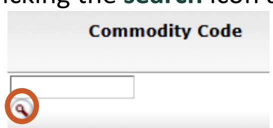
c. If you have more than one suggested supplier, add their organization names in the **Additional Suggested Vendor Names** fields.



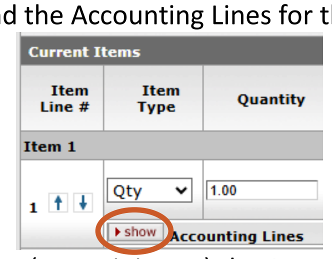
7. In the **Items** tab, enter the first line item to be purchased. For requisitions with many line items, [follow our tutorial for importing line items](#).
    a. Select the **Item Type**.
        i. **Qty:** default selection, quantity-based purchases, typically tangible goods or time-based services
        ii. **No Qty:** non-quantity-based purchases, typically services
    b. If **Qty** was selected, complete the **Quantity** and **UOM** (unit of measure) fields.
        i. **Note:** a common unit of measure is EA (each).



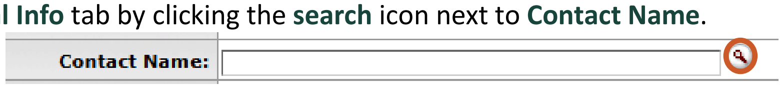
    c. Optionally, select a **Commodity Code** by clicking the **search** icon and searching for an appropriate category.



    d. Enter a **Description** for the line item. This is a text entry field. As such, additional details, including specifications, may need to be added further down in the requisition under **Notes and Attachments**.
    e. Enter the **Unit Cost**. If you don't know the unit cost, you can put in a desired price or budget, which will help MSU Procurement better source an appropriate product.
    f. Click the **add** button.
    g. Under the **Current Items** section, expand the Accounting Lines for the line item by clicking the show button.

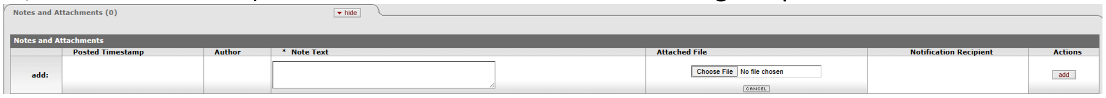


    h. Enter the account string details, including (at a minimum) the **Account Number**, **Object Code**, and the **Percent** or **Amount** allocation.
        i. **Note:** for split accounting, additional accounting lines must be added and completed, with the percent allocation across all lines totaling 100.00.
    i. Click the **add** button.
8. Repeat step 7 for all items to be purchased on the requisition.
9. If purchasing a capital asset, follow [Capital Asset Management's tutorial for completing the capital asset tab](#).
10. If another employee has more information about the purchase, enter their information as the contact in the **Additional Institutional Info** tab by clicking the **search** icon next to **Contact Name**.

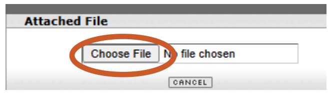


    a. **Note:** your information will be populated as the **Requestor**. If you are submitting the requisition on behalf of another employee, the requestor fields can be changed to reflect their contact information.

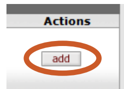
11. In the Notes and Attachment tab, add any additional, non-confidential information (e.g., detailed product specifications, IT Readiness form) to assist MSU Procurement in sourcing the purchase.



    a. Click **Choose File** to add an attachment.



    b. Click **add** to add the note and/or attachment to the requisition.



12. Click **save**. Review the requisition for completion and accuracy.
    a. **Note:** saving also allows you to exit the requisition eDoc and return to it at a later time.

13. When ready, click **submit** to send the requisition for approval.

14. On the following screen, read the provided information and, if ready to submit, click **yes**.